

Benefit Event Status Report Overview

This report lists all participants in a particular process status or set of status levels. In addition, this document includes common error results shown on this report and how to troubleshoot each one.

Events go through four steps: (1) Assign Benefit Program, (2) Prepare Options, (3) Enter Elections, (4) Finalize Enrollment. An event's process status indicates what step the event is on and whether any errors have occurred for that step. For example, a status of "Assigned" indicates that the event has assigned a benefit program to the employee, but has not yet prepared the employee's benefit options, entered elections for the employee, or finalized the employee's enrollment. A status of "Prepare Error" indicates that the event assigned a benefit program to the employee but encountered an error when preparing the employee's benefit options.

This report should be run daily by the Benefit Administrators to check on Open Events and those events with a Processing Error. This report can be used to monitor events opened through Employee-Self Service.

This job aid will walk through an example of an Election Error and the steps of how to troubleshoot according to the error message shown on the report.

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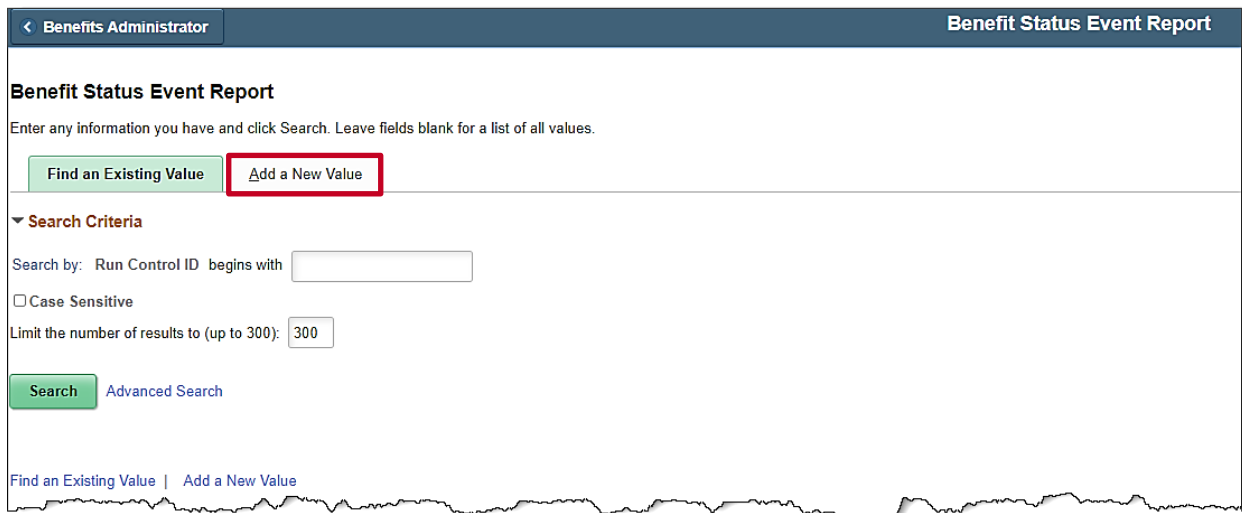
How to Run the Benefit Event Status Report

Run the Benefit Event Status Report to locate employees in the various statuses. Research the event in question and intervene as applicable, so that the event can continue to move through the Ben Admin process during the next run of Ben Admin.

1. Navigate to the Benefit Event Status Report using the following path:

Benefits > Managed Automated Enrollment > Investigate Exceptions > Benefit Event Status Report.

The **Benefit Status Event Report** Search Page displays.

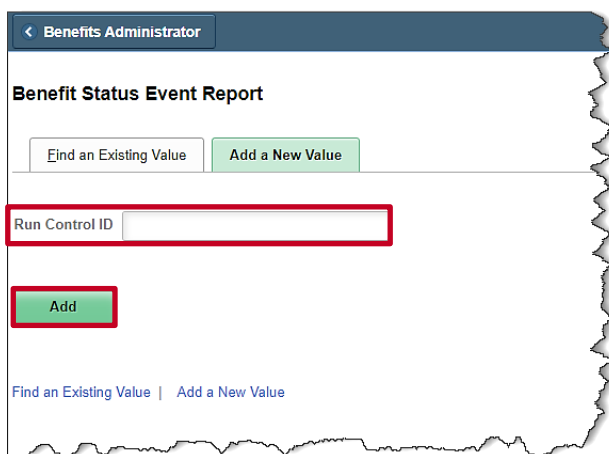


The screenshot shows the 'Benefit Status Event Report' search page. At the top, there is a navigation bar with '< Benefits Administrator' on the left and 'Benefit Status Event Report' on the right. Below the navigation bar, the title 'Benefit Status Event Report' is displayed. A instruction says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value', with the latter highlighted by a red box. Below these buttons is a section titled 'Search Criteria' with a dropdown arrow. Under 'Search Criteria', there is a 'Search by:' field with 'Run Control ID' selected and 'begins with' as the operator, followed by an empty text input box. There is also a checkbox for 'Case Sensitive' and a 'Limit the number of results to (up to 300):' field with '300' entered. At the bottom of the search criteria section are two buttons: 'Search' and 'Advanced Search'. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

Note: If the BA has a saved Run Control ID, skip to Step 5.

2. Click the **Add a New Value** button.

The **Benefit Status Event Report** Search Page refreshes.



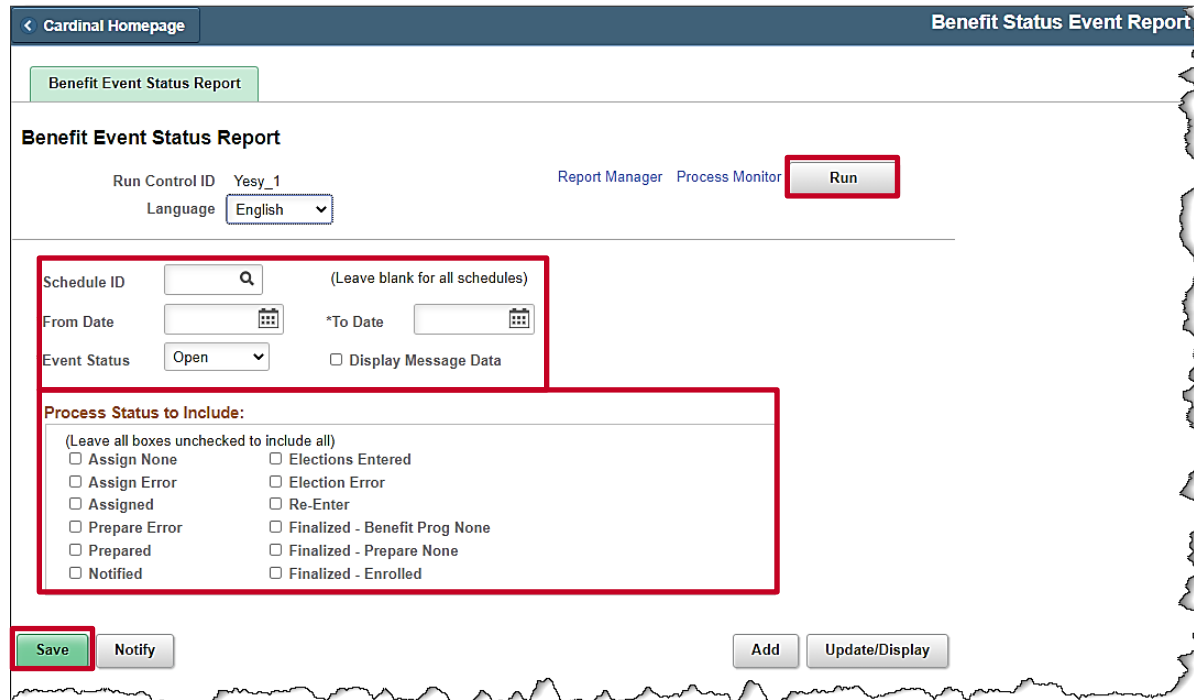
The screenshot shows the 'Benefit Status Event Report' search page after a refresh. The navigation bar and title are the same. The 'Find an Existing Value' and 'Add a New Value' buttons are now reversed, with 'Add a New Value' highlighted by a green box. Below these buttons is a 'Run Control ID' text input box, which is highlighted by a red box. Below the input box is a green 'Add' button, also highlighted by a red box. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

3. Enter a **Run Control ID** in the search box.

BN361 Benefit Event Status Report

- Click the **Add** button.

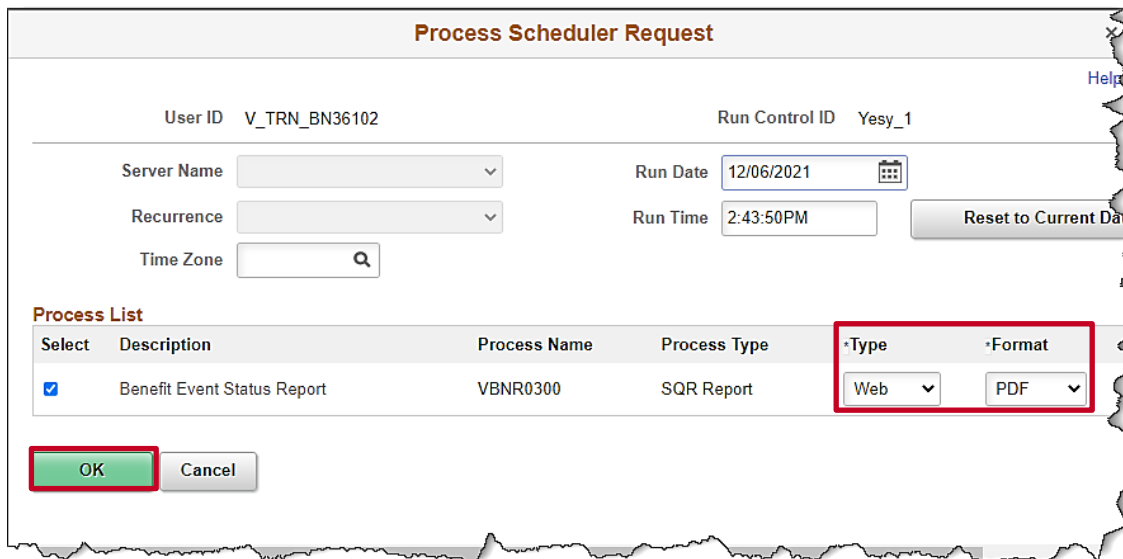
The **Benefit Status Event Report** parameters display.



- Click on the magnifying glass next to **Schedule ID** and select the schedule ID you want to work with. Most of the time it will be **EM00** unless you are working with Open Enrollment events.
Note: If the Agency BA is looking for Open Enrollment events, the Schedule ID would be **OE##**
- Select a **From Date** and a **To Date** by clicking on the calendar icons or entering it into the text boxes.
- Select an **Event Status** from the drop-down menu.
- The BA can also select one or several **Process Statuses** to include in the report.
Note: The **Process Status to Include** section can be left blank as well to include all statuses in the report.
- Click **Save**.
- Click **Run**.

BN361 Benefit Event Status Report

The **Process Scheduler Request** page displays.



Process Scheduler Request

User ID V_TRN_BN36102 Run Control ID Yesy_1

Server Name Run Date 12/06/2021

Recurrence Run Time 2:43:50PM

Time Zone

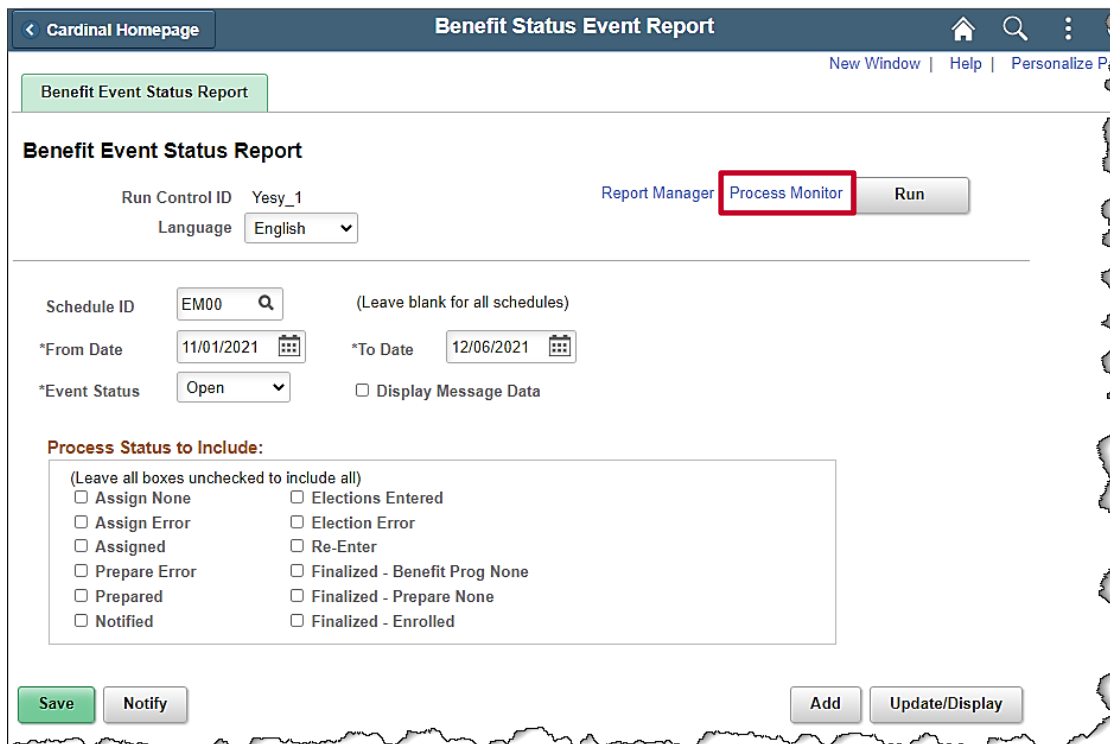
Process List

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	Benefit Event Status Report	VBNR0300	SQR Report	Web	PDF

12. Select the **Type** and **Format** to run the report in.

13. Click **OK**.

The **Benefit Event Status Report** parameters page returns.



Benefit Status Event Report

Run Control ID Yesy_1 Report Manager **Process Monitor**

Language English

Schedule ID EM00 (Leave blank for all schedules)

*From Date 11/01/2021 *To Date 12/06/2021

*Event Status Open ☐ Display Message Data

Process Status to Include:

(Leave all boxes unchecked to include all)

- ☐ Assign None
- ☐ Assign Error
- ☐ Assigned
- ☐ Prepare Error
- ☐ Prepared
- ☐ Notified
- ☐ Elections Entered
- ☐ Election Error
- ☐ Re-Enter
- ☐ Finalized - Benefit Prog None
- ☐ Finalized - Prepare None
- ☐ Finalized - Enrolled

14. Click the **Process Monitor** hyperlink.

BN361 Benefit Event Status Report

The **Process Monitor** page displays.

[Cardinal Homepage](#)

Process Monitor

Process List

View Process Request For

User ID
Type
Last
 Days

Server
Name
Instance From
Instance To
[Report Manager](#)

Run Status
Distribution Status
☒ Save On Refresh

Process List

1-1 of 1
View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1322133		SQR Report	VBNR0300	V_TRN_BN36102	12/06/2021 2:43:50PM EST	Success	Posted	Details

[Go back to Benefit Status Event Report](#)

15. Click the **Refresh** button until the Run Status for the report is Success and the Distribution Status is Posted.
16. Click on the **Details** hyperlink next to the report.

BN361 Benefit Event Status Report

The **Process Detail** page displays.

Process Detail

×

[Help](#)

Process

Instance	1322133	Type	SQR Report
Name	VBNR0300	Description	Benefit Event Status Report
Run Status	Success	Distribution Status	Posted

Run

Run Control ID	Yesy_1
Location	Server
Server	PSUNX1
Recurrence	

Update Process

☐ Hold Request

☐ Queue Request

☐ Cancel Request

☒ Delete Request

☐ Re-send Content

☐ Restart Request

Date/Time

Request Created On	12/06/2021 2:45:41PM EST
Run Anytime After	12/06/2021 2:43:50PM EST
Began Process At	12/06/2021 2:45:55PM EST
Ended Process At	12/06/2021 2:46:05PM EST

Actions

[Parameters](#)

[Message Log](#)

[Batch Timings](#)

[View Log/Trace](#)

[Transfer](#)

OK

Cancel

18. Click on the **View Log/Trace** hyperlink.

BN361 Benefit Event Status Report

The **View Log/Trace** page displays.

x
View Log/Trace

[Help](#)

Report

Report ID 761478	Process Instance 1322133	Message Log
Name VBNR0300	Process Type SQR Report	
Run Status Success		

Benefit Event Status Report

Distribution Details

Distribution Node hrpytm	Expiration Date	01/05/2022
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File List

Name	File Size (bytes)	Datetime Created
SQR_VBNR0300_1322133.log	2,180	12/06/2021 2:46:05.625818PM EST
vbnr0300_1322133.PDF	3,512	12/06/2021 2:46:05.625818PM EST
vbnr0300_1322133.out	139	12/06/2021 2:46:05.625818PM EST

Distribute To

Distribution ID Type	+Distribution ID
User	V_TRN_BN36102

20. Click on the **.PDF** output (if the format chosen was PDF).

The **Report** displays in a separate tab.

Report ID: VBNR0300										PeopleSoft Benefit Event Status Report										Page No. 1 Run Date 12/06/2021 Run Time 15:00:40										
Process	Employee	Employee	Schedule	Event	Event	Event	Event	Process	Benefit																					
Status	ID	Name	ID	ID	Date	Class	Status	Indicator	Program																					
=====																														
FE	00092634600	Lily Pad	EM00	1	12/31/2020	MAR	O	N	SAL	N																				

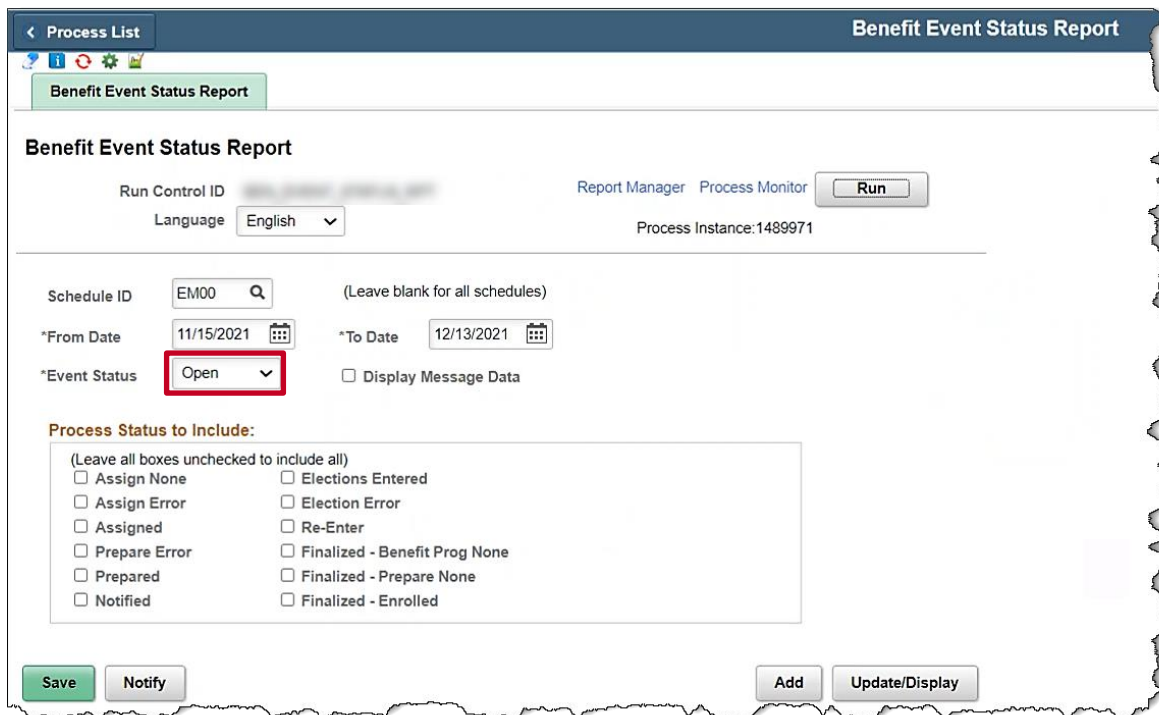
Note: The report displays the **Process Status**, **Process Indicator**, and **Benefit Program** among other sets of data. The BA can use this information to see any open events, and what stage in the process the event is currently in. This is especially helpful for processing New Hires and tracking the status of the open events.

BN361 Benefit Event Status Report

Viewing Open Events

To view **Open** events, follow the steps mentioned in the above section, **How to Run the Benefit Event Status Report** and make sure the **Event Status** is set to **Open** and the **Process Status** to include section is left blank.

The **Benefit Event Status Report** parameters page displays.



Benefit Event Status Report

Run Control ID: [REDACTED] Report Manager Process Monitor **Run**

Language: English Process Instance: 1489971

Schedule ID: EM00 (Leave blank for all schedules)

*From Date: 11/15/2021 *To Date: 12/13/2021

*Event Status: **Open** ☐ Display Message Data

Process Status to Include:

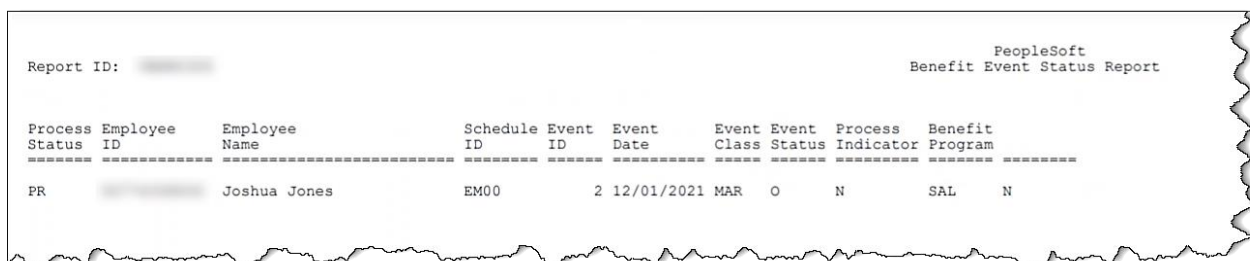
(Leave all boxes unchecked to include all)

☐ Assign None ☐ Elections Entered
☐ Assign Error ☐ Election Error
☐ Assigned ☐ Re-Enter
☐ Prepare Error ☐ Finalized - Benefit Prog None
☐ Prepared ☐ Finalized - Prepare None
☐ Notified ☐ Finalized - Enrolled

Save **Notify** **Add** **Update/Display**

1. Select **Open** from the Event Status drop down menu.
2. Click **Save**.
3. Click **Run**.
4. Follow the **Steps 11-17** from the How to run the Benefit Event Status Report section above to run the report.

The **Report** displays in a separate tab.



Report ID: [REDACTED] PeopleSoft Benefit Event Status Report

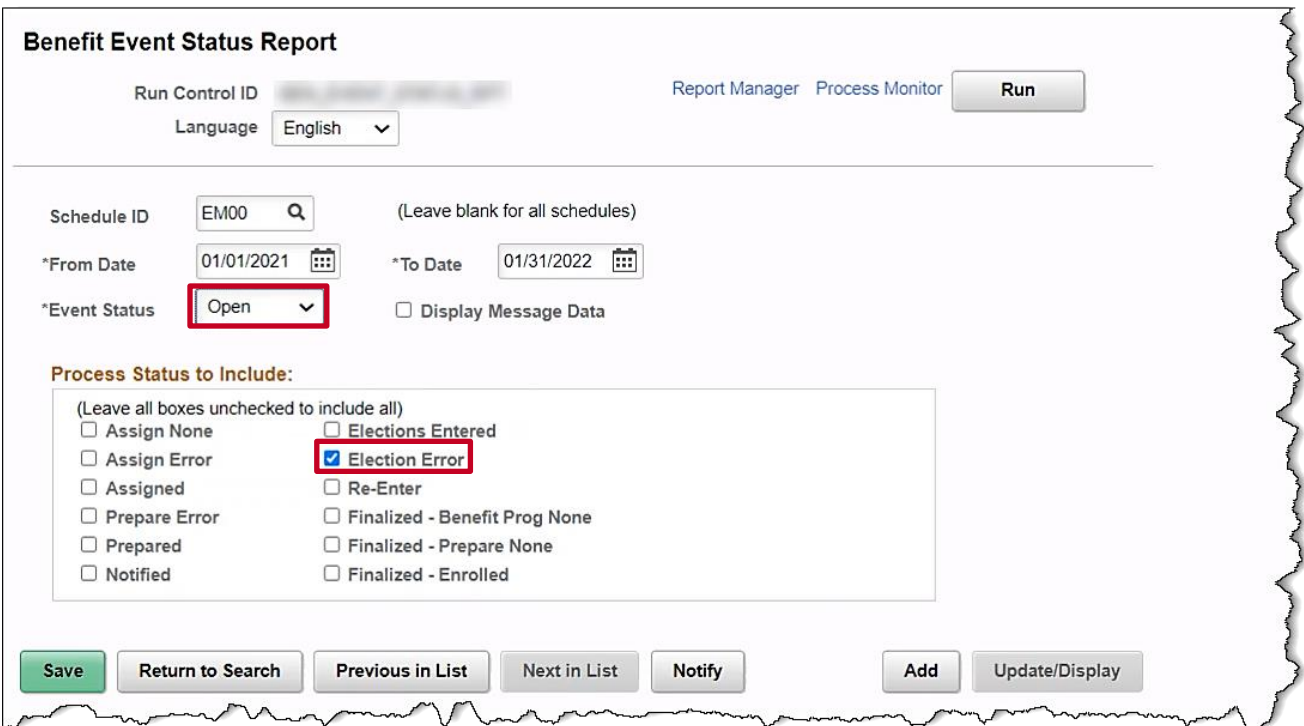
Process Status	Employee ID	Employee Name	Schedule ID	Event ID	Event Date	Event Class	Event Status	Process Indicator	Benefit Program
PR	[REDACTED]	Joshua Jones	EM00	2	12/01/2021	MAR	O	N	SAL N

BN361 Benefit Event Status Report

Viewing and Troubleshooting Open Events with an Election Error

To view **Open** events with an **Election Error**, follow the steps mentioned in the above section, **How to Run the Benefit Event Status Report** and make sure the **Event Status** is set to **Open** and the **Election Error** is checked off in the **Process Status to include** section.

The **Benefit Event Status Report** parameters page displays.



Benefit Event Status Report

Run Control ID: [REDACTED] Report Manager Process Monitor **Run**

Language: English

Schedule ID: EM00 (Leave blank for all schedules)

*From Date: 01/01/2021 *To Date: 01/31/2022

*Event Status: **Open** ☐ Display Message Data

Process Status to Include:

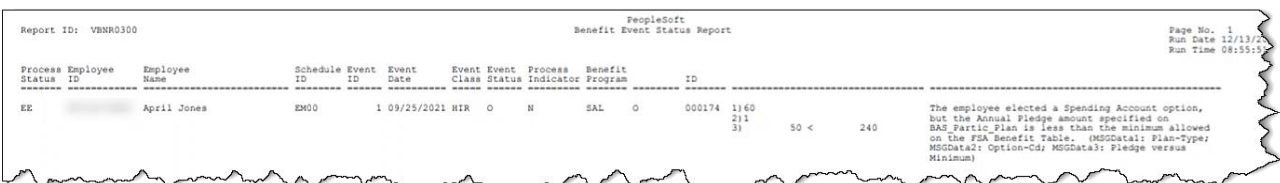
(Leave all boxes unchecked to include all)

<input type="checkbox"/> Assign None	<input type="checkbox"/> Elections Entered
<input type="checkbox"/> Assign Error	<input checked="" type="checkbox"/> Election Error
<input type="checkbox"/> Assigned	<input type="checkbox"/> Re-Enter
<input type="checkbox"/> Prepare Error	<input type="checkbox"/> Finalized - Benefit Prog None
<input type="checkbox"/> Prepared	<input type="checkbox"/> Finalized - Prepare None
<input type="checkbox"/> Notified	<input type="checkbox"/> Finalized - Enrolled

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Add** **Update/Display**

1. Select **Open** from the Event Status drop down menu.
2. Check the box next to **Election Error**.
3. Click **Save**.
4. Click **Run**.
5. Follow the **Steps 11-17** from the **How to run the Benefit Event Status Report** section above to run the report.

The **Report** displays in a separate tab.



Report ID: VBNR0300 PeopleSoft Benefit Event Status Report Page No. 1
Run Date 12/13/2021 Run Time 08:55:11

Process Status	Employee Name	Schedule ID	Event ID	Event Date	Event Class	Event Status	Event Indicator	Process	Benefit Program	ID
EE	April Jones	EM00	1	09/25/2021	NIR	O	N	SAL	O	000174 1160 211 31 50 < 240

The employee elected a Spending Account option, but the Annual Pledge amount specified on BAF Partic_Plan is less than the minimum allowed on The FSA Benefit Table. (MSGData1: Plan-Type; MSGData2: Option-Cd; MSGData3: Pledge versus Minimum)

BN361 Benefit Event Status Report

Note: The Error in this screenshot says: “The employee elected a Spending Account option but the Annual Pledge amount specified on BAS_Particip_Plan is less than the minimum allowed on the FSA Benefit Table.”

- Review the Report output and depending on the Error message different steps to troubleshoot need to take place. For this example, the BA would navigate to the On-Demand Event Maintenance Page using the following path:

Homepage > Benefit Administrator Tile > Benefits Management > On-Demand Event Maintenance.

The **On-Demand Event Maintenance** search page displays.

On-Demand Event Maintenance
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID

begins with ▼

Empl Record

= ▼

Name

begins with ▼

Last Name

begins with ▼

Second Last Name

begins with ▼

Alternate Character Name

begins with ▼

☐ Case Sensitive


Limit the number of results to (up to 300):

300

Search

Clear

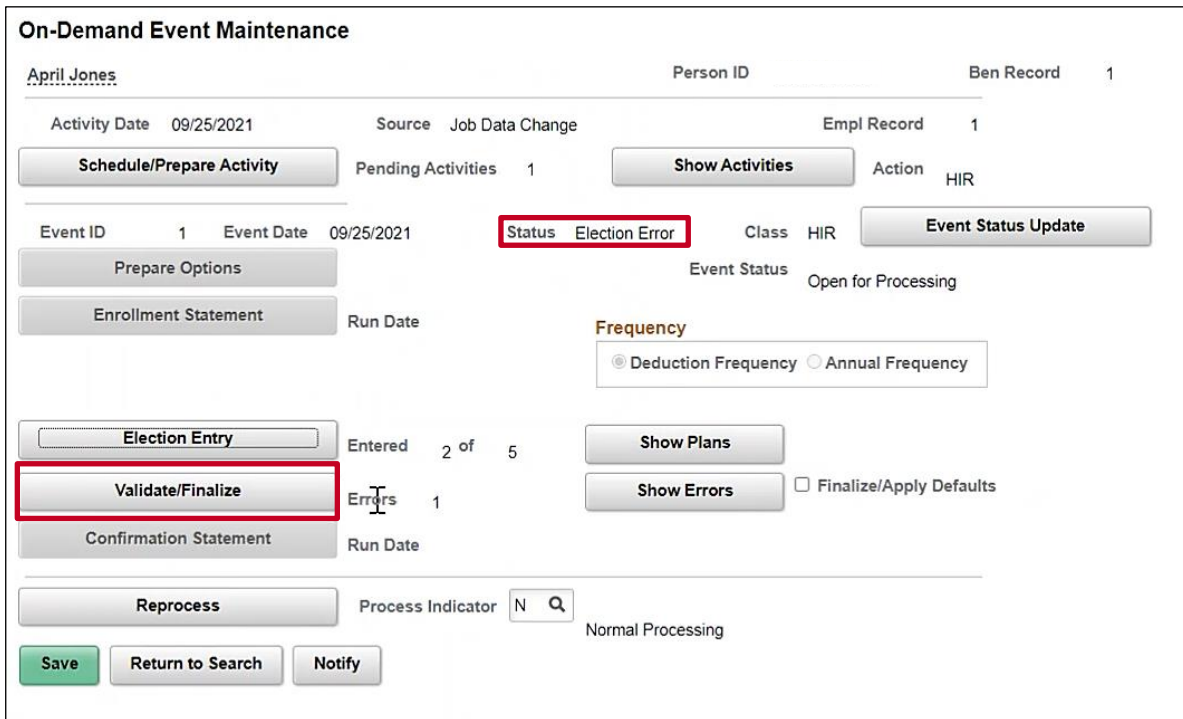
Basic Search

 Save Search Criteria

- Enter the employee ID of the affected employee into the **Empl ID** field and click **Search**.

BN361 Benefit Event Status Report

The **On-Demand Event Maintenance** page displays.



On-Demand Event Maintenance

April Jones Person ID Ben Record 1

Activity Date 09/25/2021 Source Job Data Change Empl Record 1

Schedule/Prepare Activity Pending Activities 1 **Show Activities** Action HIR

Event ID 1 Event Date 09/25/2021 **Status Election Error** Class HIR **Event Status Update**

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Election Entry Entered 2 of 5 **Show Plans**

Validate/Finalize Errors 1 **Show Errors** ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

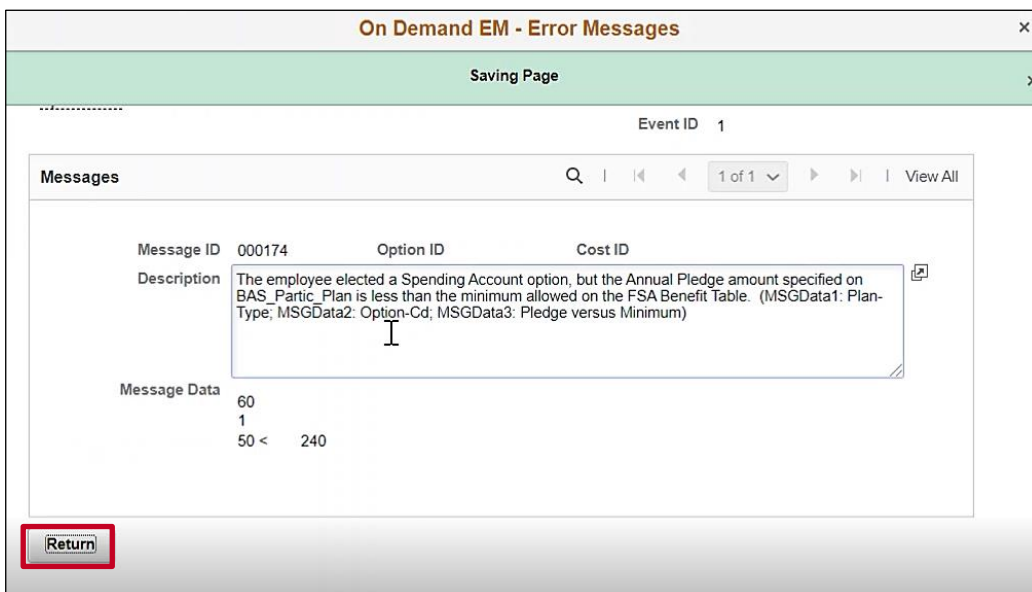
Reprocess Process Indicator N **Normal Processing**

Save **Return to Search** **Notify**

Note: Notice the Status of the event is **Election Error** just as it appeared in the report.

8. Click the **Validate/Finalize** button to see this employee's errors.

The error displays in a dialog box.



On Demand EM - Error Messages

Saving Page

Event ID 1

Messages 1 of 1 View All

Message ID	Option ID	Cost ID
000174		

Description The employee elected a Spending Account option, but the Annual Pledge amount specified on BAS_Particip_Plan is less than the minimum allowed on the FSA Benefit Table. (MSGData1: Plan-Type; MSGData2: Option-Cd; MSGData3: Pledge versus Minimum)

Message Data

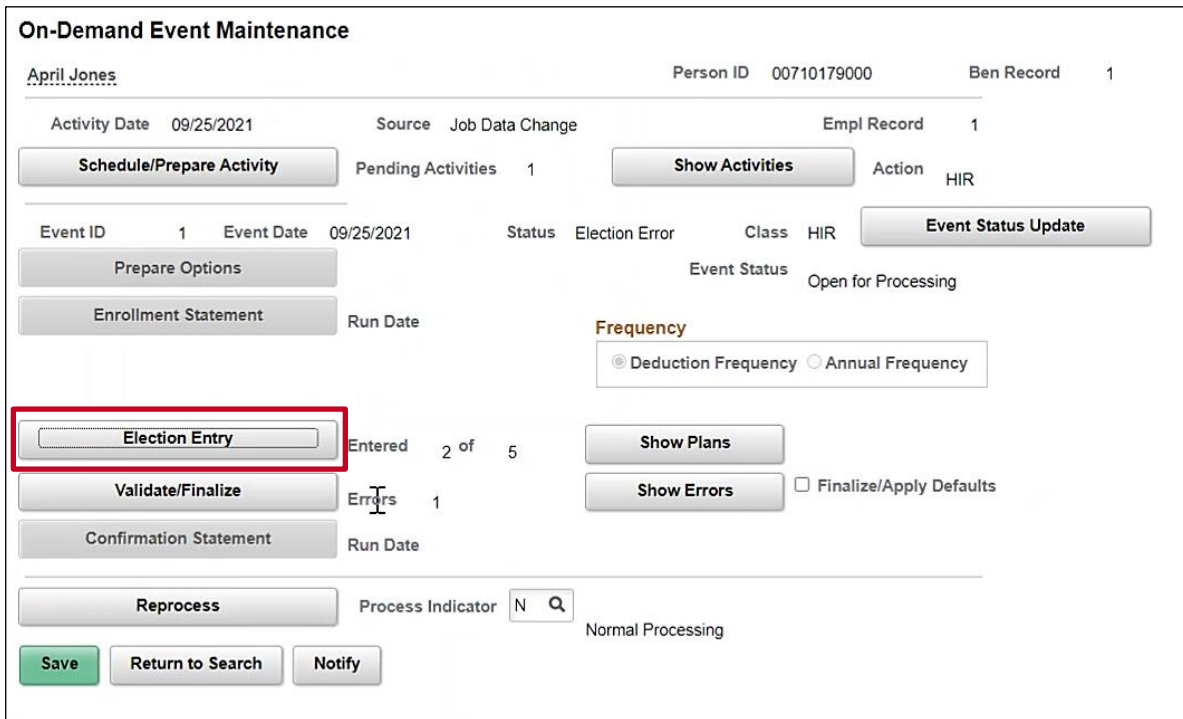
60	
1	
50 <	240

Return

9. For this example, the employee's spending account annual pledge is less than the minimum allowed. Click the **Return** button.

BN361 Benefit Event Status Report

The **On-Demand Event Maintenance** page displays.



On-Demand Event Maintenance

April Jones Person ID 00710179000 Ben Record 1

Activity Date 09/25/2021 Source Job Data Change Empl Record 1

Schedule/Prepare Activity Pending Activities 1 **Show Activities** Action HIR

Event ID 1 Event Date 09/25/2021 Status Election Error Class HIR **Event Status Update**

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 2 of 5 **Show Plans**

Validate/Finalize Errors 1 **Show Errors** ☐ Finalize/Apply Defaults

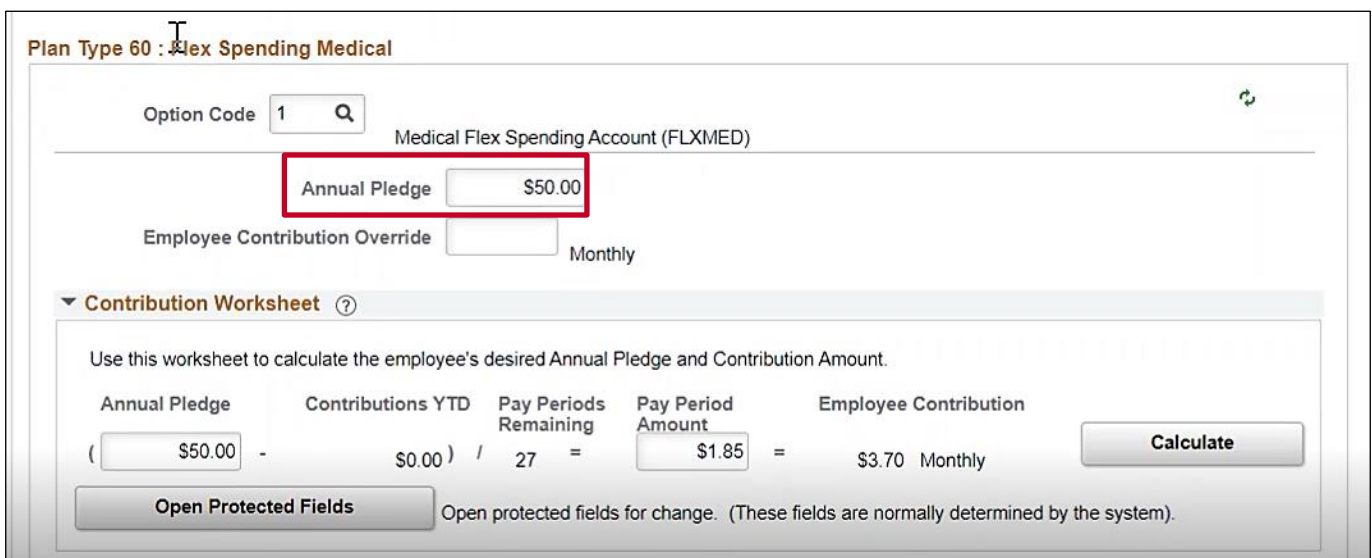
Confirmation Statement Run Date

Reprocess Process Indicator N **Normal Processing**

Save **Return to Search** **Notify**

- Click on **Election Entry** to view the employee's spending account annual pledge. Scroll to **Plan Type 60: Flex Spending Medical**.

The **Plan Type 60** section displays.



Plan Type 60 : Flex Spending Medical

Option Code 1 **Medical Flex Spending Account (FLXMED)**

Annual Pledge \$50.00

Employee Contribution Override Monthly

Contribution Worksheet ?

Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
(\$50.00)	- \$0.00	/ 27	= \$1.85	= \$3.70 Monthly

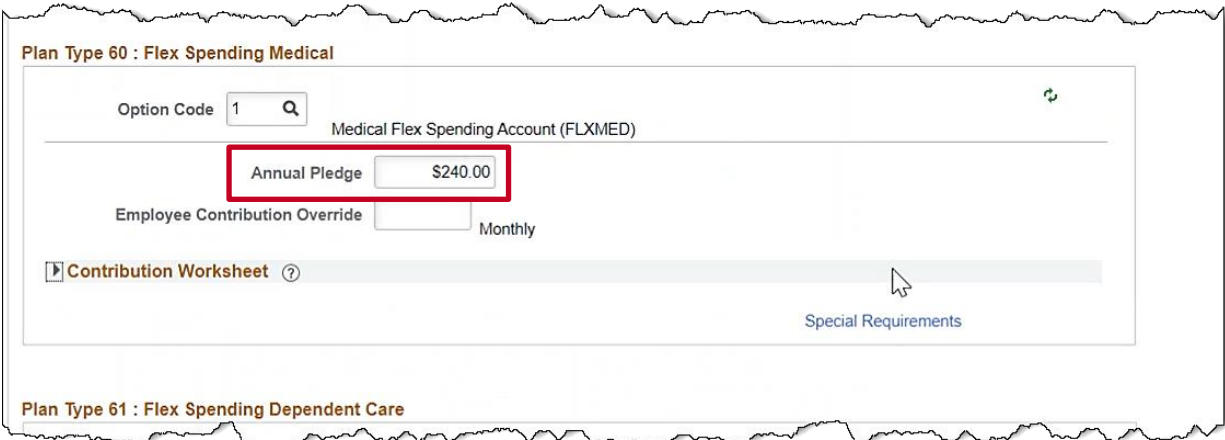
Open Protected Fields Open protected fields for change. (These fields are normally determined by the system).

Calculate

Note: The employee's annual pledge of \$50 is less than the Commonwealth's minimum. At this stage, the **BA** may reach out to the employee to explain the policy and ask for a revised amount before continuing with processing the **New Hire** benefit enrollment. Once the BA has collected the revised amount for the employee, continue to **Step 11**.

BN361 Benefit Event Status Report

The **Plan Type 60: Flexible Spending Medical** section refreshes.



Plan Type 60 : Flex Spending Medical

Option Code

Medical Flex Spending Account (FLXMED)

Annual Pledge

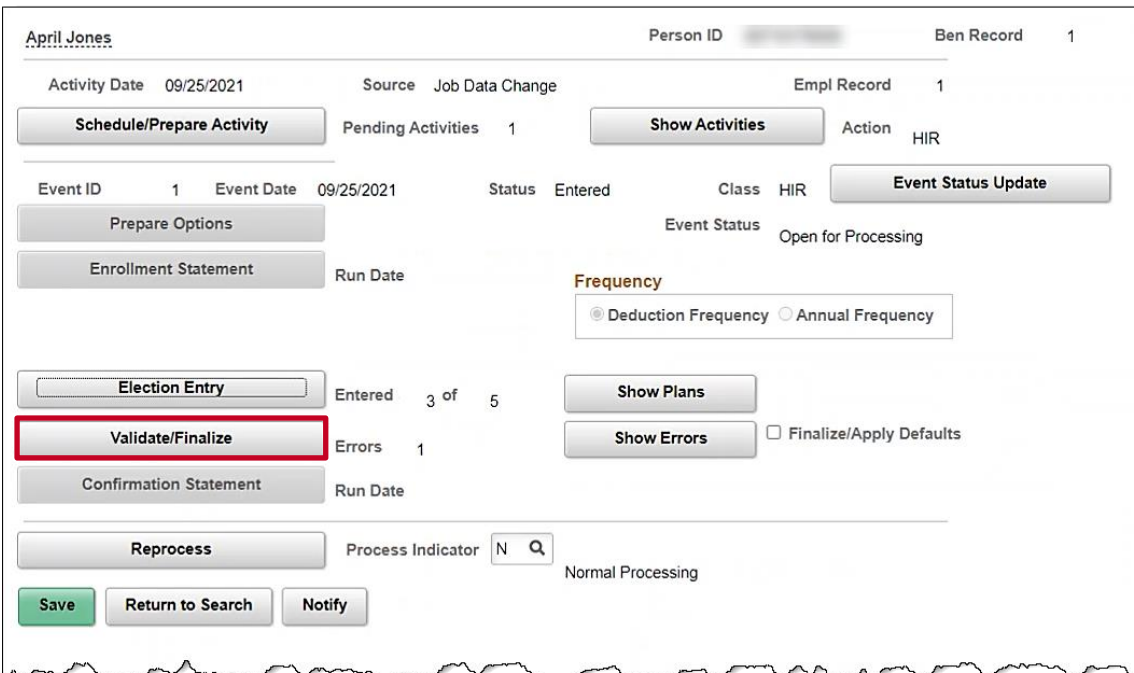
Employee Contribution Override Monthly

[Contribution Worksheet](#) [Special Requirements](#)

Plan Type 61 : Flex Spending Dependent Care

11. For this example, the employee has chosen to update the Flexible Spending amount to \$240.00. Enter the new amount in the **Annual Pledge** text box under **Plan Type 60: Flexible Spending Medical**.
12. Confirm the **Plan Type AZ: Flex Spending Admin Fee** is elected and click **OK**.

The **On-Demand Event Maintenance Page** returns.



April Jones Person ID Ben Record 1

Activity Date 09/25/2021 Source Job Data Change Empl Record 1

Pending Activities 1 Action HIR

Event ID 1 Event Date 09/25/2021 Status Entered Class HIR

Event Status Open for Processing

Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Entered 3 of 5

Validate/Finalize Errors 1 ☐ Finalize/Apply Defaults

Run Date

Process Indicator Normal Processing

13. Click the **Validate/Finalize** button.

BN361 Benefit Event Status Report

The **On-Demand Event Maintenance** page refreshes.

On-Demand Event Maintenance

April Jones Person ID Ben Record 1

Activity Date 09/25/2021 Source Job Data Change Empl Record 1

Schedule/Prepare Activity Pending Activities 1 Show Activities Action HIR

Event ID 1 Event Date 09/25/2021 Status Finalized - Enrolled Class HIR Event Status Update

Prepare Options Event Status Closed to Processing

Enrollment Statement Run Date

Frequency
☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

14. Confirm that the **Status** is Finalized-Enrolled and the **Event Status** is Closed to Processing.

Note: The BA has fixed the Election Error for this example by updating the Annual Pledge for the employee.